## Process Guide Content

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eRequisition Catalog Item Process Guide

This process guide provides instruction on the functional steps to create an eRequisition containing a catalog item. For NC E-Procurement, an eRequisition is a requisition that is created electronically using the Ariba system. If an item appears in the catalog, it signifies that that item is part of a Statewide Term Contract with the State of North Carolina.

I. Create an eRequisition

An eRequisition is created when a user selects items to order in NC E-Procurement. The user initiating the requisition is referred to as the requester. There are two main steps required to create an eRequisition:

1. Add Items – Select and add items to the shopping cart.
2. Summary – Enter title, shipping, accounting, comment, and attachment information, as well as review the eRequisition for accuracy.

The Ariba Dashboard, shown below, is the first page displayed once a user logs into NC E-Procurement. To begin an eRequisition, click the ‘eRequisition’ link in the ‘Common Actions’ Portlet, or click ‘Create’ on the Menu Bar and then select ‘eRequisition.’
II. Add Items

Users may add catalog (Statewide Term Contract) items to their eRequisition by utilizing the catalog search functionality. From the ‘Catalog Home’ page, a user can also navigate to the Punchout catalogs, as well as choose to create a non-catalog item. Punchout and non-catalog requisitioning processes are covered in separate process guides.

Users can search the catalog using several methods. In addition to being able to browse the catalog by clicking a Supplier Name or Category, users can click ‘Options’ to view additional search field options.

1. **Keywords (e.g., pen)** may be entered in the first free-text field to the left of the ‘Search’ button.

   **Note:** The keyword search field is intuitive and incorporates approximate string matching for user entries (e.g., even if a keyword is misspelled, the system will still produce search results).

2. **Supplier Part #:** If a user knows the Supplier Part Number of the item for which they are searching, they may enter it here.

3. **Manufacturer Part #:** If the user knows the Manufacturer Part Number of the item for which they are searching, they may enter it here.

4. **Contract ID:** Enter the specific State of NC Statewide Term Contract ID here to search for all catalog items on a specific Statewide Term Contract. A list of Contract IDs may be found at [http://www.pandc.nc.gov/numlistt.aspx](http://www.pandc.nc.gov/numlistt.aspx).

5. **Commodity Codes:** The National Institute of Government Purchasing (NIGP) provides a standardized list of Commodity Codes. Commodity Codes provide a means for classifying goods and services to promote purchasing efficiency. A list of Commodity Codes and the goods/services they represent may be found at [http://www.pandc.nc.gov/ipsalpha.htm](http://www.pandc.nc.gov/ipsalpha.htm)
6. Enter the desired search criteria and click the ‘Search’ button.

7. The Catalog Navigation Panel will provide options to allow users to refine results. Those options will automatically appear and are dependent on the search results. Select an option from this menu to see only those results matching the specified criteria.

8. ‘Your search path’ displays the trail of the current search. Click any of the links to move back through the trail.
9. Clicking a link next to ‘Sort By’ allows users to sort the search results based on Relevance, Price, or Name.

   a. Relevance places the items with the best or most complete match near the top.
   b. Price places the least expensive items closer to the top.
   c. Name sorts the list alphabetically by name.
10. Users who want to select items from a Supplier Punchout Catalog may enter the name of the supplier in the keyword field or type ‘punchout’ to view a complete list of ‘Supplier Punchout Catalog Resources.’ Click the supplier’s name to directly access the supplier’s online catalog for the Statewide Term Contract. For additional information on ordering from punchout catalogs, please refer to the ‘eRequisition Punchout Item Process Guide.’

11. Some catalog items are placeholders for additional ordering instructions. Items containing additional ordering instructions will reflect a price of ‘$0.00 USD’ and will contain the necessary steps in the item description. Users should refer to those instructions when adding this type of item to their eRequisition.

Note: There are several icons that may be displayed on a catalog line item that indicate additional information about the item or supplier.
12. The **Scroll Icon** indicates that a PDF version of the contract is available for viewing. Click the **Scroll Icon** to see the Contract.

**Note:** The PDF file will open in a pop-up window. Pop-up window blockers must be turned off to allow the window to appear. Adobe® Reader® is required to view PDF files. Adobe® Reader® is available for free download at [http://get.adobe.com/reader/](http://get.adobe.com/reader/).

13. The **Recycled Content Icon** indicates that the item is made from recycled materials.

14. The **DIST Icon** indicates that an item is supplied by a distributor. Once the item is added to the shopping cart, users will need to select the appropriate distributor through the ‘Supplier’ field.

15. The **HUB Icon** indicates that the item is supplied by a registered Historically Underutilized Business (HUB).

**Note:** North Carolina E-Procurement receives vendor HUB certification status directly from the Office for Historically Underutilized Businesses.

16. To view detailed supplier information, click the underlined supplier name link. The ‘Review Details for Supplier’ screen will appear. Click ‘Done’ to return to the search results.
17. Using the ‘View’ options, the user can choose whether to view the item in a more detailed view (‘Details’) or as a Thumbnail view (‘Thumbnails’).

The **Details** view shows details of the catalog items, such as Supplier Part Number, Statewide Term Contract ID, etc.

The **Thumbnails** view condenses the catalog items, showing only the shortened Description and Price.
18. Users can add items to an eRequisition at any time by checking the box next to the desired item and clicking the ‘Add to Cart’ button next to that item. To add multiple items, check the box next to more than one item and then click ‘Add to Cart’ at the top of the search results.
19. Two or more items can be compared side by side to quickly review the attributes of those items. Check the boxes next to the items to be compared and click the ‘Compare’ button.

20. The ‘Compare Items’ page will be displayed. Once the information has been reviewed, click ‘Done’ to return to the search results.

21. In order to add items directly from the ‘Compare Items’ page, update the quantity for the desired item and click ‘Add to Cart.’
22. Once ‘Add to Cart’ is selected, the ‘Summary’ page will be displayed and the selected item(s) will display on the eRequisition.

23. More items can be added to the eRequisition at this point by clicking ‘Add from Catalog’ or ‘Add Non-Catalog Item.’

**Note:** Users may see a more detailed view on the ‘Summary’ page by clicking ‘Show Details.’

24. After a catalog item has been added to an eRequisition, users may see more information about a supplier by clicking on the supplier’s name in the detailed view.
Note: The ‘Review Details for Supplier’ page appears, showing users additional details about a supplier including the supplier locations.

Note: Users may click on one of the supplier’s locations to view even more information, such as the address, contact name, and preferred ordering method.

25. Click ‘Done’ to return to the eRequisition ‘Summary’ page.

26. Click ‘Catalog Home’ to clear the search results and return to the initial Catalog Search page.
III. Summary

The ‘Summary’ page allows the user to enter a title as well as shipping, comment, and attachment information. It also allows the user to review the eRequisition for accuracy. The approval flow for the eRequisition can be viewed from the ‘Approval Flow’ Tab on the ‘Summary’ page as well.

1. Once on the ‘Summary’ page, users can enter a title for the eRequisition. The title should be descriptive of the items being purchased and can be used to make the eRequisition easily identifiable.

2. The ‘Pre-Encumbrance Status’ appears for NCAS users only and indicates the pre-encumbrance status of the eRequisition in NCAS. The field remains populated with ‘Not Encumbered’ until the eRequisition has been sent to NCAS to pre-encumber the designated amount.

Note: Once a user submits the eRequisition, the information is sent to NCAS to pre-encumber the designated amount of the purchase order. The ‘Pre-Encumbrance Status’ reflects when the eRequisition has been pre-encumbered. When the eRequisition becomes a purchase order, the money will be fully encumbered in NCAS.

3. The ‘On Behalf Of’ field will default to the requester’s name. To create an eRequisition on behalf of another user, use the ‘On Behalf Of’ drop-down menu and select that user’s name. If the user does not appear in the drop-down menu, select ‘Search for more…’ and search for the user in the pop-up window that appears.

4. The ‘Delay Purchase Until’ field, visible for NCAS and Non-Integrated users only, allows the eRequisition to be submitted and approved but not be distributed to the supplier until the date specified.

Note: Funds will not be encumbered in NCAS until the date specified in the ‘Delay Purchase Until’ field and a purchase order is successfully created with a status of ‘Ordered.’

5. The ‘Buying Entity’ field, visible for NCAS users only, will default to the buying entity that is selected in the user’s profile. It can be updated using the ‘Buying Entity’ drop-down menu. If the desired buying entity does not appear in the drop-down menu, select ‘Search for more…’ and search for the desired buying entity.

6. The ‘Transmit to Supplier’ field, visible for NCAS and Community College users only, defaults to checked, meaning that the purchase order, when created, will be sent to the supplier. If the box is unchecked the supplier will not receive a copy of the purchase order.
7. While on the ‘Summary’ page, users may review the eRequisition line items prior to submitting the eRequisition. Line items can be edited, copied, and/or deleted directly from this page by checking the box next to the line item and clicking the appropriate button. See the ‘Editing Line Items’ process guide for additional information regarding those processes.

**Note:** Click the ‘Hide Details’ link to minimize the amount of information that is shown for each line item. Once the ‘Hide Details’ link has been selected, the requisition details will remain hidden until the user changes their default preference or clicks the ‘Show Details’ link.

**Note:** The small button next to the ‘Hide Details’ link opens the ‘Table Options Menu’ and can be used to select exactly what information is displayed for each line item.

![Image of eRequisition interface]

The ‘Hide Details’ link minimizes the amount of information shown for eRequisition line items. It toggles back and forth with the ‘Show Details’ link.

Users may ‘Edit,’ ‘Copy,’ or ‘Delete’ line items by checking the box beside the line item(s) and clicking the appropriate button.

The ‘Table Options Menu’ button allows users to pick which details will appear in the detailed eRequisition view.
8. The ‘Shipping – Entire eRequisition’ section at the header level should be populated according to where and to whom the items on the eRequisition should be shipped. Shipping preferences entered here will default on the entire eRequisition unless a user has entered unique values on certain line items.

**Note:** Shipping preferences for single lines may be set by editing the line item individually. These edits will remain in place even if the user changes an overall setting on the ‘Summary’ page.

9. The ‘Ship To’ field automatically defaults to the ship to location set up in the user’s profile. Users may choose a different option by selecting ‘Search for more...’ from the drop-down menu.

**Note:** The ‘Ship To’ drop-down menu contains the ship-to addresses that have been entered by an administrator. These addresses are agency specific.

10. The ‘Deliver To’ field indicates the recipient of the order. This is a free-text field that defaults to the requester's name. The default value can be deleted, and the field can be populated with any value.

11. The ‘Need-by Date’ field is transmitted on the purchase order to the supplier as the date by which the items need to be delivered. The calendar icon next to the field may be used to select the appropriate date.

12. The ‘Shipping Method’ field describes the method by which items will be shipped to the buyer and defaults to ‘BEST WAY’ for both NCAS Agencies and EP Lite Agencies. This field can be changed by selecting ‘Search for more...’ from the drop-down menu.

13. The ‘Freight on Board (FOB) Code’ reflects how freight charges for the order are paid. This value defaults to ‘001’ for NCAS Agencies and ‘Destination’ for EP Lite Agencies. Using the drop-down menu, users may select ‘Search for more...’ to find the option that best meets the user’s agency purchasing policies.

14. The ‘Terms of Payment’ field describes the timelines and conditions of payment to the vendor and defaults to ‘N30’ for both NCAS Agencies and EP Lite Agencies. Using the drop-down menu, users may select ‘Search for more...’ to find the option that best meets the user’s agency purchasing policies.
15. Comments may be added for the entire eRequisition using the ‘Comments – Entire eRequisition’ field. The requester may add only one comment at the header level of the eRequisition. If more comments are needed, they may be added either at the line item level or at the header level by approvers of the eRequisition.

16. Attachments may be added to the eRequisition at the header level by clicking the ‘Add Attachment’ button.

17. The ‘Add Attachment’ page is displayed after the ‘Add Attachment’ button has been clicked at the header level on the ‘Summary’ page. Click the ‘Browse’ button to locate and select an attachment, then click ‘OK’ once the attachment is selected to populate the ‘File’ field.

**Note:** The following file types are acceptable as attachments: .bmp, .csv, .doc, .docx, .gif, .htm, .html, .jpeg, .jpg, .pdf, .png, .potx, .ppsx, .ppt, .pptx, .ps, .rtf, .sldx, .txt, .xls, .xlsx, .xltx, .xml, and .zip

**Note:** The maximum file size for attachments is 5MB. Adding more than 10MB of total attachments may cause a delay when sending purchase orders to vendors who receive their orders via the Ariba Supplier Network (ASN), and adding more than 5MB of total attachments may cause a delay when sending purchase orders to vendors who receive their orders via email.
18. Once an attachment has been added to an eRequisition, the user can add more attachments by clicking the ‘Add Attachment’ button again. Users may also change an existing attachment’s visibility to the supplier by checking or unchecking the ‘Visible to Supplier’ checkbox. Finally, users may delete unwanted attachments by clicking the corresponding ‘Delete’ button.

19. The system generated approval flow can be reviewed by clicking the ‘Approval Flow’ tab. For more information regarding approval flows, see the ‘Approving an eRequisition’ process guide.

20. To submit the eRequisition to be reviewed and approved by the approval flow, click the ‘Submit’ button either at the top of the bottom of the page.
IV. Catalog Item Kits

Catalog Kits are items in NC E-Procurement that are bundled together by the supplier into one unit, such as items that are typically ordered for new employees. When ordered from the catalog, users will order a Catalog Kit as one item. However, the Catalog Kit might appear in the eRequisition as a list of separate items.

1. Catalog Kit items can be located by performing a keyword search for the Catalog Kit name.

2. The returned search results will display the Catalog Kit name and will have a Catalog Kit Icon displayed to indicate that the item is a Catalog Kit.

3. To add the Catalog Kit Item to the eRequisition, click ‘Add to Cart’ next to the desired kit.

   **Note:** The entire Catalog Kit will be added to the eRequisition initially. Once added, users can then make edits to the Catalog Kit, including the deletion of certain items. Catalog Kit items that are required cannot be deleted.

4. When first added to the eRequisition, the Catalog Kit will appear as one compressed line item, but all the line numbers will be indicated (i.e. 1 – 4).
5. Click the arrow next to the compressed line item to view all lines associated with the Catalog Kit.

6. Once the Catalog Kit is expanded, each line item will be visible. The ‘Kit requires item’ checkbox will indicate whether the line is required for the Catalog Kit. If the ‘Kit requires item’ box is checked, users will not be able to remove the line from the eRequisition.

7. If the ‘Kit requires item’ box is not checked, users may delete the line item by checking the box next to the line item and clicking ‘Delete.’
V. Catalog Item Enumeration

Enumerations are Statewide Term Contract items that have specific attributes associated with them and that require the user to select a preferred option before the item is added to the eRequisition (e.g., size, color, delivery options). When a user adds an Enumeration item to the eRequisition, the system displays the options for the user to choose. The user should select the preferred options and click ‘OK’ to add the item to the shopping cart.

1. Execute a keyword search and add the item to the eRequisition by clicking ‘Add to Cart.’ An additional screen will prompt users to select or enter additional information related to the selected item.
2. Select the necessary additional information using the drop-down menu for the applicable Enumeration option.

3. Click ‘OK’ to add the item to the eRequisition.

4. Once the Enumeration line item has been added to the eRequisition, it will be visible and editable at the line item level in the ‘Summary’ page.

   **Note:** To edit a previously entered Enumeration choice, the user may check the box next to the item on the ‘Summary’ page and click the ‘Edit’ button to reach the ‘Edit Line Items’ page.
5. In the ‘Line Item Details’ section, click the drop down arrow next to the attribute to select a value.

6. Click ‘OK’ to return to the ‘Summary’ page.

Note: The user will receive an error message if they try to submit an eRequisition without the Enumeration selected.
VI. Catalog Item Favorites

Users may add specific Statewide Term Contract items to a favorites list for quick reference. Catalog items saved as favorites are updated as the catalog item is updated (e.g., price, description). To utilize catalog Favorites, users must first define ‘Favorites Folders.’ Specific catalog items can then be added to a defined Favorites Folder. If no folder is defined, any items marked as Favorites will be added to a folder named ‘My Default Folder.’

1. To define a Favorites Folder, execute a catalog search for the desired item.

2. Click the ‘Add to Favorites’ link next to the item and select ‘Organize Favorites.’

3. Click ‘New Folder.’
4. Enter the name of the folder in the available free-text field and click ‘OK.’

5. The same item may be added to multiple folders by checking the box next to each folder and clicking the ‘Add’ button. If the item already exists in a folder, the user will receive an error message.
6. To make changes to favorites lists, a user may check the box next to the appropriate folder and click ‘Edit Folders,’ ‘Delete Group,’ or ‘New Folder.’ Once all necessary folders are updated, click ‘Done.’

**Note:** Clicking the ‘Delete Group’ button will permanently delete an individual item within a folder or the entire folder and all of its saved contents. This action cannot be undone.
7. Users will be returned to the catalog search after clicking ‘Done.’

8. Now that the folder has been created, click ‘Add to Favorites’ next to the desired item and then ‘Add To Folders…’

9. Check the box next to the folder that will contain the item and click ‘Add.’
10. Users with ‘NCAS Purchasing,’ ‘EPLite Purchasing,’ and ‘Non-Integrated Purchasing’ roles will have the ability to check the ‘Public’ box to publish a favorites list that will become an agency standard. Check the box next to the favorites list to become public, and then click the ‘Edit Folders’ button.

11. While in edit mode, check the ‘Public’ box for the chosen favorites list and click ‘OK.’
12. Once a favorites list has been classified as public, the user must then choose which groups will have access to the published favorites list. They may do this by clicking ‘Select’ under the ‘Public To Groups’ column. The ‘Choose Values for Public To Groups’ page will be displayed. Check the box next to the chosen group and click ‘Done.’

13. Users with ‘NCAS Purchasing,’ 'EPLite Purchasing,’ and ‘Non-Integrated Purchasing’ roles will have the ability to check the ‘Public Add’ and ‘Public Delete’ boxes either independently or together. When these boxes are checked, users who have the ability to view the published favorites list will also be able to add items, delete items, or both.
Note: Once the item has been added to the desired Favorite Folder, a star will appear next to the item to mark it as a Favorite.

The Favorites icon helps users to identify which catalog items have been saved to their favorites.

Note: Users may view one of their Favorite Folders by clicking the ‘Favorites’ drop-down menu on the ‘Catalog Home’ page and choosing the appropriate one.

Note: Users may view all of their Favorites Folders by picking ‘Other…’ from the ‘Favorites’ drop-down menu. Clicking the ‘Select’ button for a folder will allow users to view all catalog items contained in that folder.
VII. Catalog Saved Searches

Users may save frequently used catalog searches for future reference. This can be helpful for users that add the same type of line items to an eRequisition on a regular basis.

1. From the ‘Catalog Home’ page, users should run the catalog search using the same parameters as the search that they would like to be saved. The results will be displayed based on the requirements that the user has entered.

2. Click the ‘Options’ link to view the list of available options for the search.

3. Click ‘Save Current Search…’

4. In the ‘Search Name’ field, enter the name of the search that is being saved.

5. Click the ‘Save’ button. The catalog search is now saved and the user is returned to the ‘Catalog Home’ page.
6. To use a saved search, click the ‘Options’ link from the ‘Catalog Home’ page.

7. Choose the saved search to execute under ‘Saved Searches.’ The results for that search will be displayed.

**Note:** Saved searches save the search criteria to be executed, not specific catalog items. To save specific catalog items, refer to the ‘Catalog Items Favorites’ section of this process document.